rego consulting

Let Rego Be Your Guide

Clarity Express – User Guide

clarity express

Date: 03/04/2025

Version: 2.5

Table of Contents

1. Document Revision History

Version	Date	Name	Description
1.0	06/13/2023	Rego Consulting	Document Creation
1.1	03/16/2024	Rego Consulting	Version related updates User Guide
2.0	02/08/2025	Rego Consulting	Version related updates User Guide
2.4	03/02/2025	Rego Consulting	Version related updates to match latest release including Timesheets module
2.5	03/04/2025	Rego Consulting	Timesheet module – support for attestation and timesheet real time validation rules

2. Purpose

The Clarity Express Mobile App for Broadcom's Clarity PPM (Project Portfolio Management) software provides a rich mobile experience, allowing organizations to access Clarity on the go. This app enables users to leverage the latest Clarity functionality through REST API and a streamlined experience using the Modern UX. Intended for "in the field" Work Management, with Clarity Express, you can:

- Login to AWS (Amazon Web Services) or GCP (Google Cloud Platform) environments, supporting SSO enabled environments
- Manage Checklists
- View and create To Dos
- Interact with Action Items
- Navigate through Projects and related modules including: Blueprint properties, OOTB modules and subobjects
- Timesheets **(NEW!)**

This application is available for free in the iOS and Android app stores.
Please note that for view-only Clarity users to use the mobile app, additional configuration is required. Access Rights and authentication options are easily managed through the Clarity Application.

3. Setup Guide

3.1 Supported Versions

Clarity Express supports Clarity 16.1.2 or higher versions; functionality is based on your Clarity version and some options might not be available.

3.2 Access Rights and Permissions

For users to access the functionality provided by the app, users must have the necessary access rights. We highly recommend assigning the following rights through a Security Group for seamless access to the functionality via the web version and mobile application.

- The following access rights are required for "My Workspace:"

Access Right	Description
Account Settings – Navigate	Allows Access to the Account Settings page.
API – Access	Grants access to REST API. This right is required to run an application utilizing the REST API. A user must have the appropriate application rights to view or update specific functional areas.
Checklist – Create	Allows user to create Checklists.
My Workspace – Navigate	Allows user access to the "My Workspace" pages in the new user experience. Security determines which Checklists a user can interact with in "My Workspace"
To Do – Create – All	Allows user to create To Dos in the new user experience for which the user has access to view associated objects.
To Do – Delete – All	Allows user to delete all To Dos in the new user experience for which the user has access to view To Dos and to view associated objects.
To Do – Edit – All	Allows user to view and edit all To Dos in the new user experience for which the user has access to view associated objects.
To Do – Navigate	Allows user access to the To Do pages in the new user experience.
To Do – View – All	Allows user to view all To Dos in the new user experience for which the user has access to view associated objects.
Resource – View – All	Allows user to view all resources and their information except the financial properties of the resource. This right is dependent on **Resource – Navigate** being granted.

- "Projects" will use the native permissions from Clarity allowing users to only view and/or edit instances they have access to. Please note FLS support is not available yet.
- "Timesheets" will use the native permissions from Clarity and will drive:
  - Timesheet list results.
  - Actions allowed on the Timesheet property view.

3.3 Using API Keys (Optional)

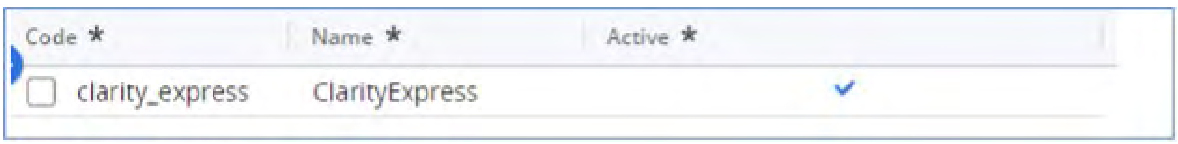
Clarity Express also allows users to leverage API Keys, making the authentication experience more seamless. When the app is using API Keys to authenticate, it will not prompt users for credentials when their previous session has expired. Otherwise, if disabled, users will get prompted to login when the previous session has expired.

To use API Keys, the Clarity administrations will need to create an API Client as per Clarity's functionality. The application generates and uses Personal API keys on a per user basis. This means an API Key will match the corresponding user's access rights and settings.

To create an API Client, Follow these steps:

1. Log in to Clarity MUX (Modern UX).
2. From the left-side main menu, tap Administration.
3. Tap Authentication & Keys.
4. Tap CLIENTS.
5. Tap Add Row to define a new client.
    - The following values must be used to match the screenshot below:

Code	clarity_express
Name	ClarityExpress
Active	Checked



If at any point the functionality needs to be disabled, clear the Active checkbox; the client is now inactive, and all keys created by all users for that client are temporarily disabled. Users cannot generate new keys while a client is disabled. When the administrator reactivates the client, the previous keys will start working again.

For additional details, refer to:

https://techdocs.broadcom.com/us/en/ca-enterprise-software/business-management/clarity-project-and-portfolio-management-ppm-on-premise/16-1-3/reference/Clarity-REST-APIs/REST-API-Authentication.html

4. Login

Upon first use of the application, the application will prompt login information. Clarity Express supports SSO and non-SSO login options.

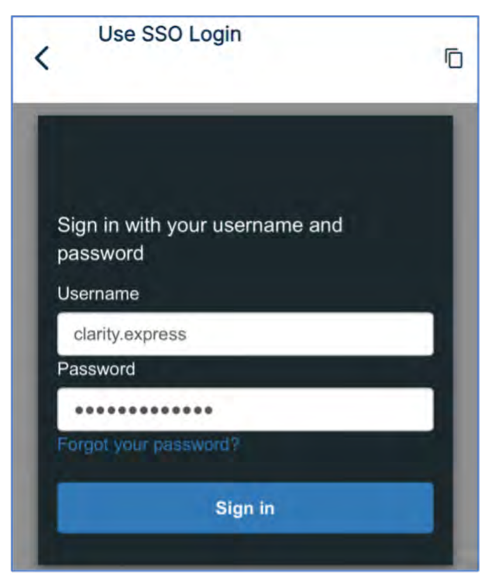
Please note, that after a session timeout, login might be requested again unless the app is configured to use API Keys.

Non-SSO Login

1. In the “Clarity URL” field, type in your Clarity URL.   You must start with **“https://”** as we only support secure environments.
2. Leave the toggle off for “Use SSO Login,” and type in your username and password. This password must match the application password.
3. Once all information is entered, tap on “Login In” to access the application.

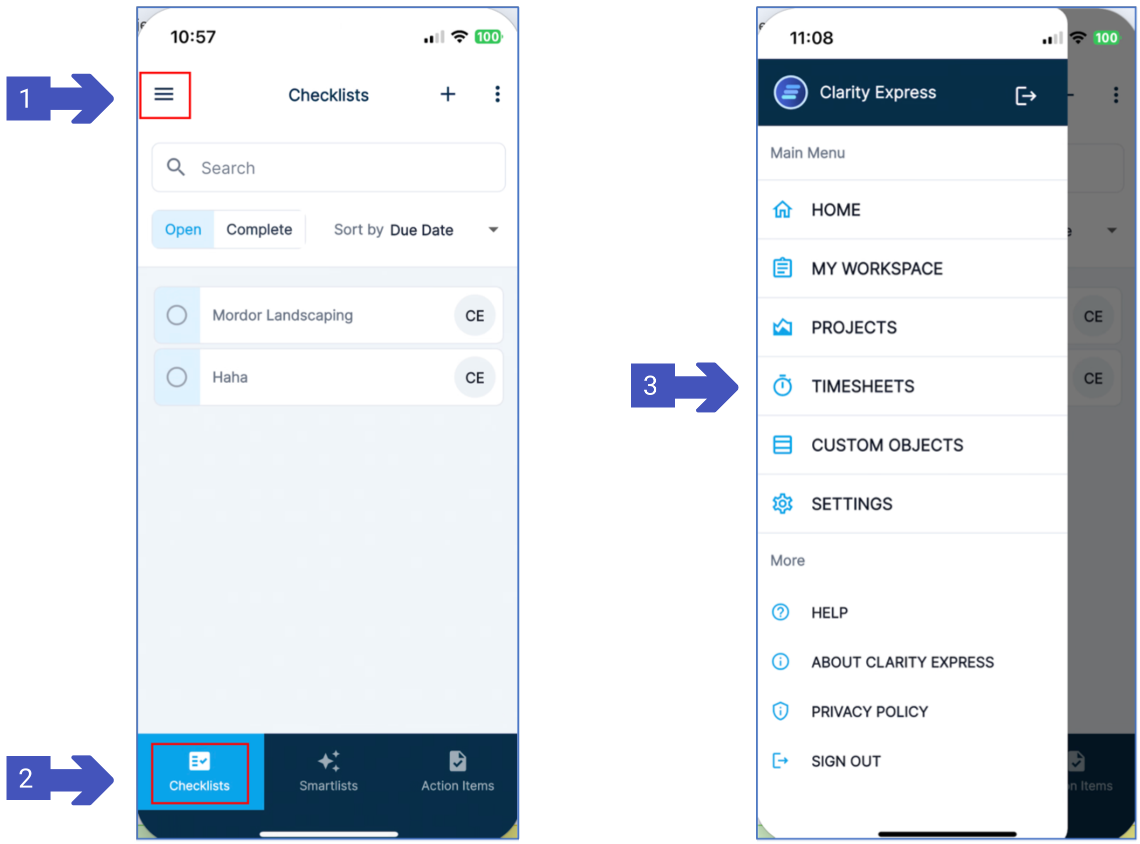
SSO Login

6. In the “Clarity URL” field, type in your Clarity URL. You must start with “https://” as we only support secure environments.
7. Enable the toggle for “Use SSO Login.”
8. Tap on “Login in with SSO.” This will open your SSO login page through a browser window. Once SSO is completed it will load the application.



5. Navigation and Functionality

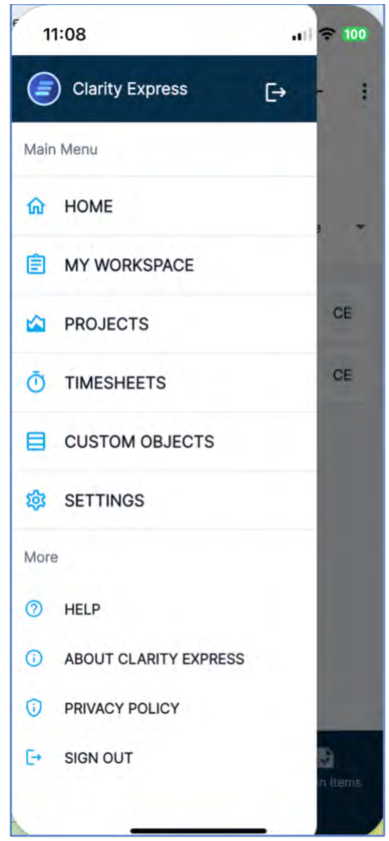
Once logged in to the application, navigating in Clarity Express is a seamless experience with a mobile friendly layout and functionality that Clarity supports natively. The sections below walk you through the basics on how to navigate the application.



5.1 Main Menu

1. Upon login, the “Home” page will default to “Checklists.”
2. Tap the 3 dashes icon on the upper left corner to open the main menu.
3. The main menu will contain the following options:
   a. Home –navigates to the home page. By default this is set to “Checklists,” but can be modified by the user by selecting “Set this screen as Home” on the screens that allow it.
   b. My Workspace – navigates to the Work Management module which allows users to interact with: Checklists, Smart Lists and Action Items.
   c. Projects – navigates to the Project grid layout, allowing users to view and/or edit Projects and related modules.

d. Timesheets - navigates to the Timesheets module.
e. Custom Objects –displays a list of all available custom objects (based on user access rights) and provides the grid and properties view to allow listing, editing and creation of new instances.
f. Help - navigates to the Rego Consulting site.
g. About Clarity Express - navigates to View Licenses.
h. Settings – provides application information and functionality to: Contact Support, Clear User Preferences, etc.
i. Privacy Policy - navigates to the Privacy Policy.
j. Sign Out - closes the session and deletes stored information like the related login details and/or API Key.



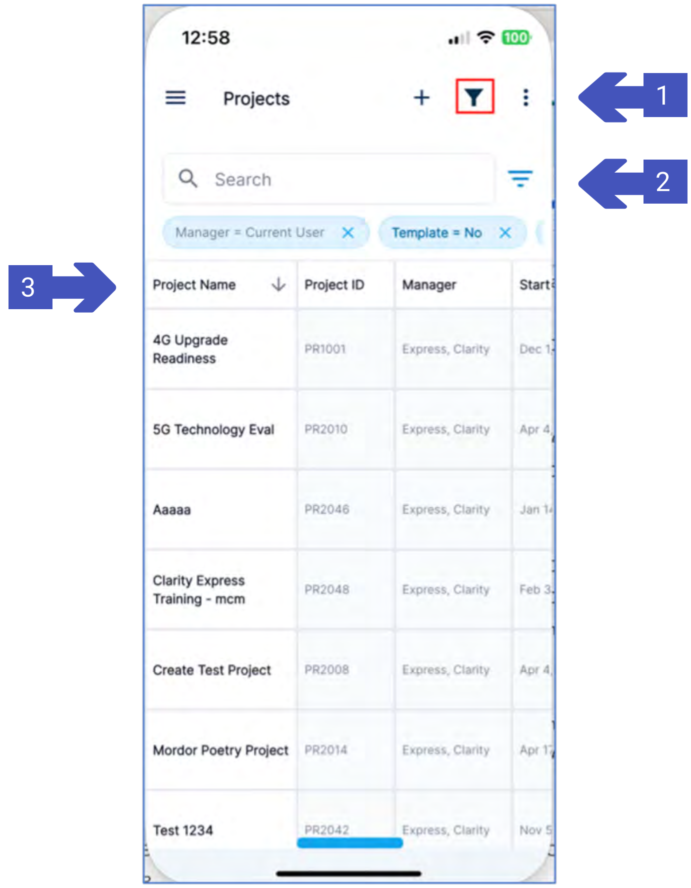
5.2 Settings

Under “Settings” users can:

1. Visualize session and system information.
2. Get help with the app. Tap on “Report device log to developers.” You will have the option to provide details to our support team using your device’s default email client.
3. Reset app. Tap on “Reset” to reset all personalization, including Home Page, Grid, and View configuration.

5.3 Grid Functionality

When navigating through the application, users will be able to visualize their data through Clarity Express' grid display. The functionality below is available for most grids and when personalized it will be saved as user configuration for this specific environment (see "Reset.")

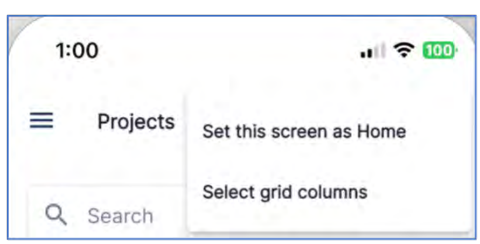


1 **The header displays:**

Filter Toggle – allows users to show/hide the filter section. (Filter section is automatically hidden on devices when using horizontal view.)

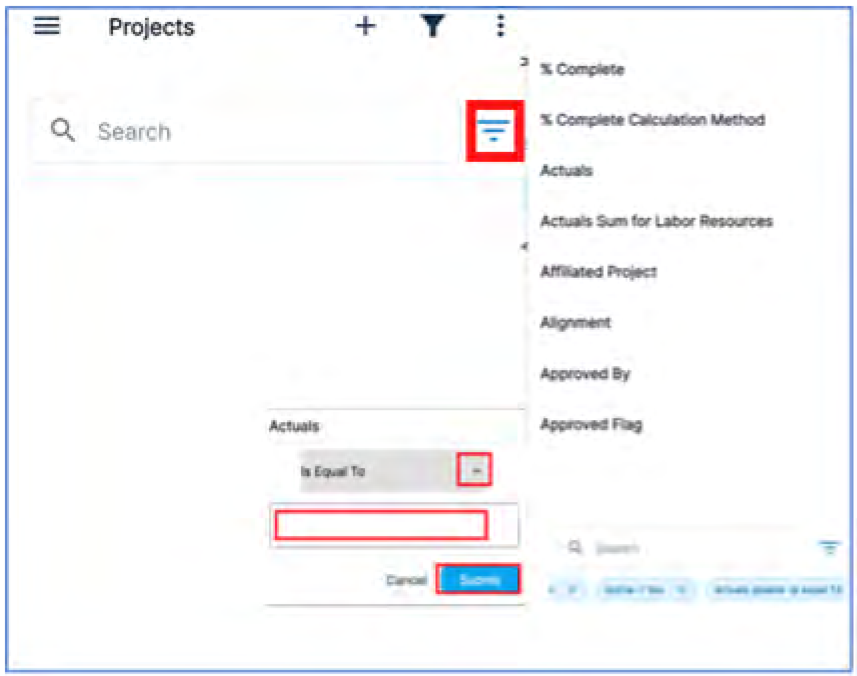
Context Menu/Ellipsis – will display the available options for the screen/grid.

- Selecting "Set this screen as Home" will set the current screen as the "Home" screen.
- Selecting "Select grid columns" will allow you to customize the grid.



2 **When enabled, the filter area will display:**

- Search Box – functions like the filter box in Clarity. Users can search using free text on the Code and Name fields of the object.
- Filter Icon, next to the search box – opens a list of available filterable fields. Users can select a field from the dropdown menu to apply a filter. Based on the field type, users can choose a filtering condition (e.g., “Is Equal To”) and enter a value. (See highlights in screenshot below.)
- Breadcrumbs – shows all active filters on the current view; by taping on the adjacent “x”, users can remove that filter.
- “+” Plus Sign – Allows users to create new instances of supported objects within the current version of the app. When selected, a form or entry screen appears, displaying all fields included in the Grid, along with any required fields that must be completed before saving.



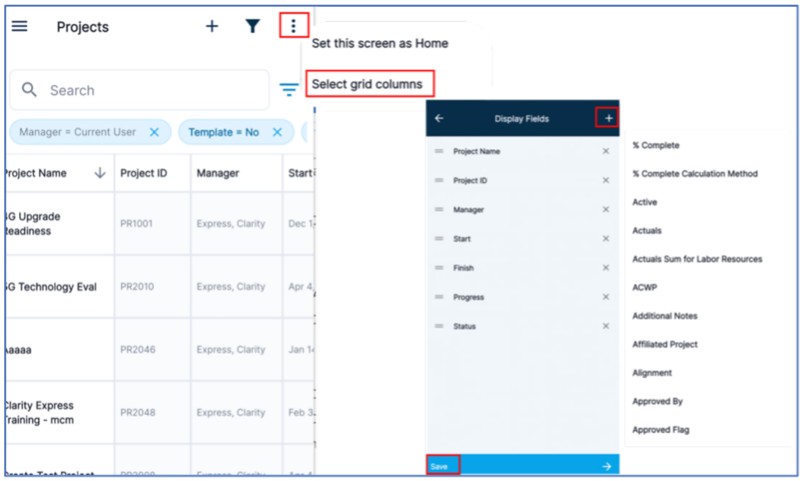
3 **The Grid section displaying the data allows users:**

- To always freeze the first column selected, which we recommend as a unique identifier or name of the instance.
- Tap on the headers to sort ascending and descending based on the selected field.
- Scroll horizontally to visualize additional columns.

Select grid columns

For those grids that allow the grid layout to be personalized, the context menu will have the option "Select grid columns."

1. After taping on the option, the user will see all selected fields on the current grid view.
2. Taping on the "+" icon on the upper right corner will display all available columns.
3. Once a column is added, columns can then be:
   a. Reordered – select the icon on the left of each column name, then drag and drop.
   b. Remove a column – tap the "x" icon on the right side of each column.
4. To save the changes, tap "Save."

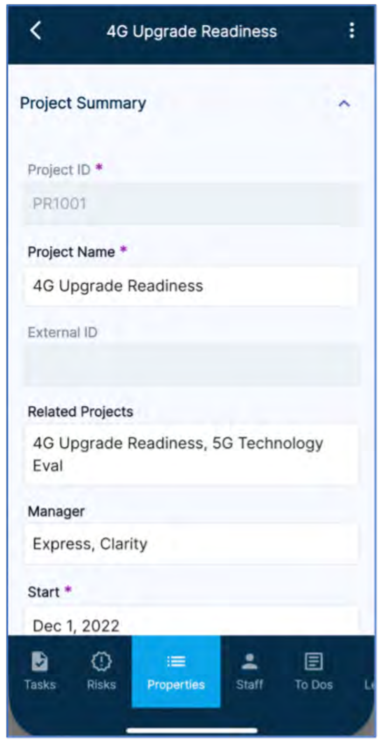


5.4 Properties View

Clarity Express will also allow users to navigate to the details of each instance under the "Project" module. Depending on the type of object the instance belongs to, instances will be displayed with sections (as per the instance's blueprint) or as a basic form.

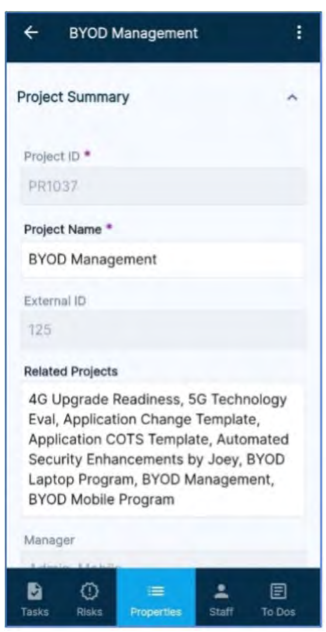
1. When editing an instance:
   - Required fields will display a red asterisk "*" next to the field label.
   - Read only fields will be greyed out.
   - When selecting a field for editing UI will provide components depending on the field type:
     - Calendar for date fields.
     - Popup window for lookups.
     - A textbox for text-based fields.
   - As the fields are edited, the instance is automatically saved.

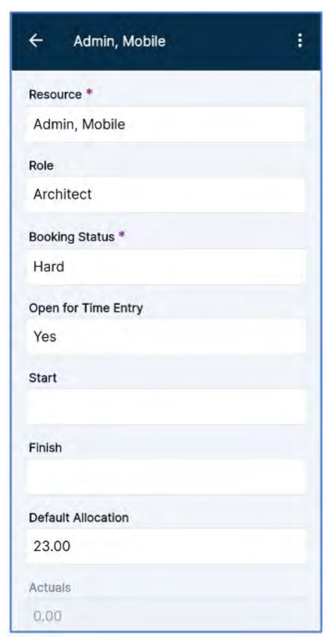
2. For Blueprint based views, the following fields will be displayed:
   a. Sections – can be collapsed or expanded as needed. **Please note, Business Rules are not currently supported.**
   b. Fields – will be displayed in the same order as the blueprint.



3. For objects that don't support a blueprint, the fields will be displayed matching the grid columns from left to right, as a top-to-bottom layout (see sample screenshot below for Tasks).

Supported	Not Supported





6. Modules

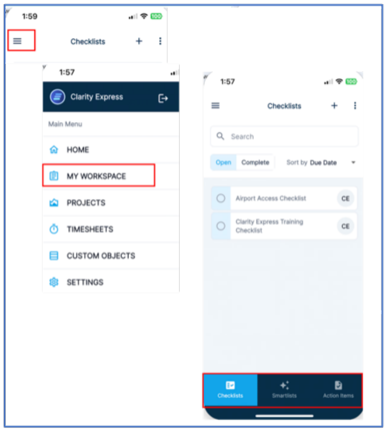
6.1 My Workspace

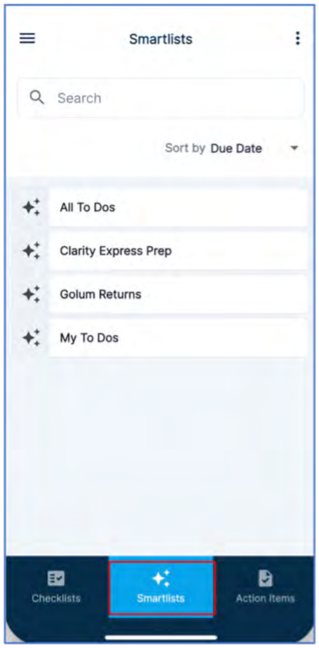
In the “My Workspace” module, users can navigate the following options by using the bottom menu:

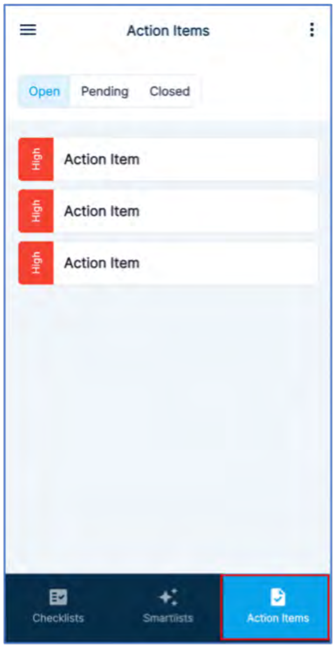
Checklists

Smart Lists

Action Items



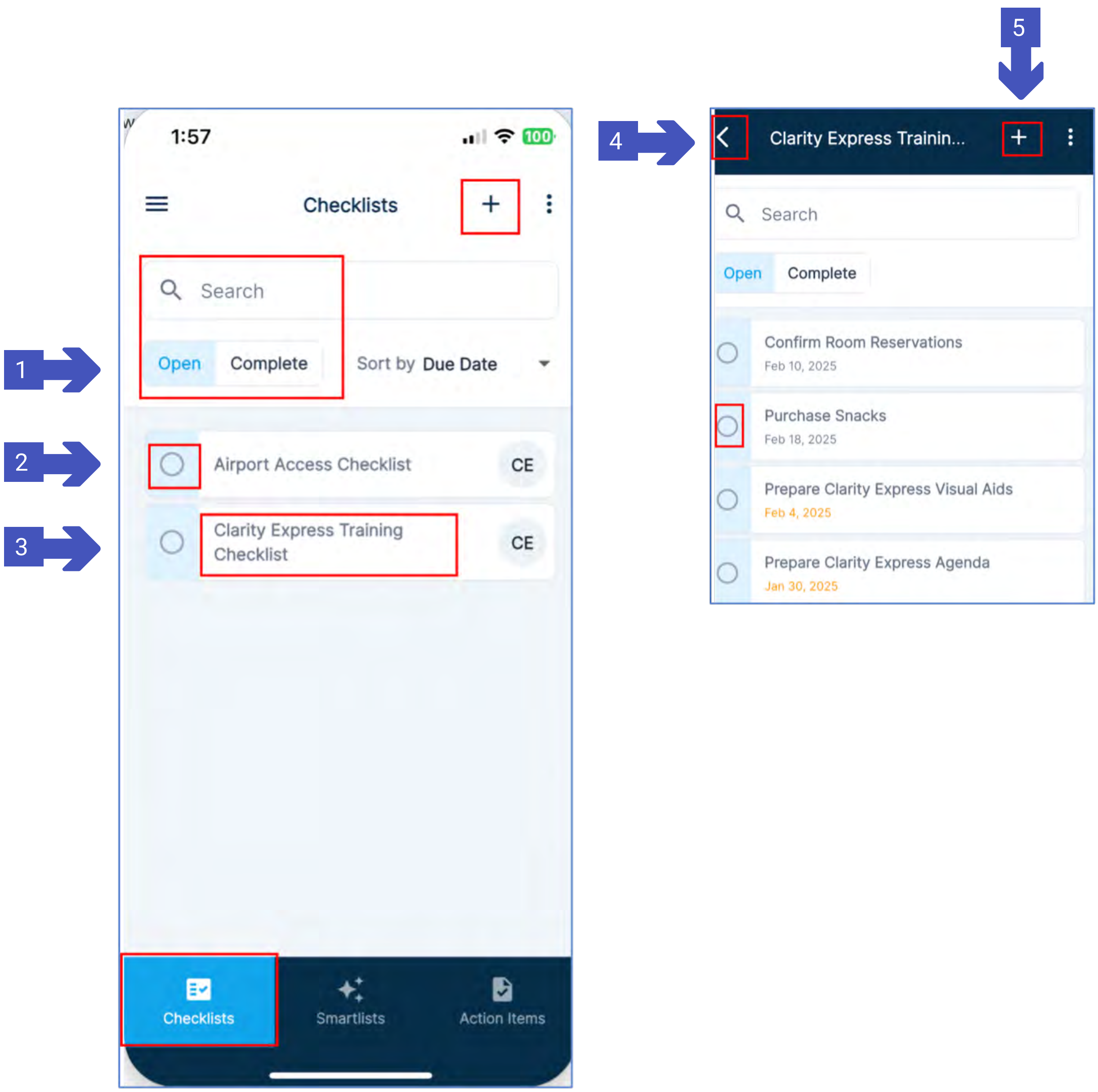




6.2 Checklists, Smart Lists and To Dos

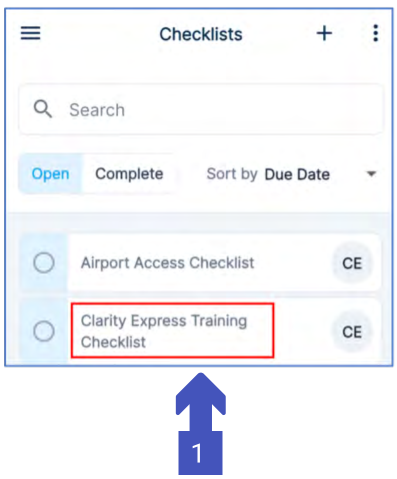
Clarity Express will also allow users to navigate to the details of each instance under the “Project” module. Depending on the type of object the instance belongs to, instances will be displayed with sections (as per the instance’s blueprint) or as a basic form.

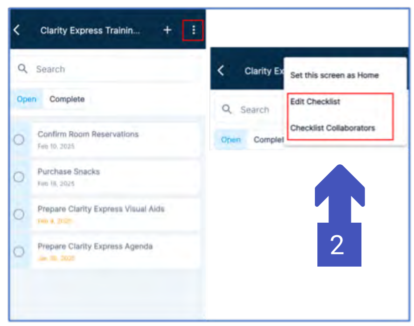
1. Users can navigate to existing Checklists and To Dos by selecting the corresponding “Open” or “Complete” filter. The results can be further filtered or sorted using the options at the top of the screen.
2. Open a Checklist or a Smart List by tapping the Checklist/Smart List Name.
3. Taping on the left circle icon for a Checklist/Smart List/To Do will mark it Complete.
4. Tapping the ‘<’ Back icon returns to the Checklists/Smart Lists page.
5. Users can also create a new Checklist by taping on the orange icon on the lower right corner.

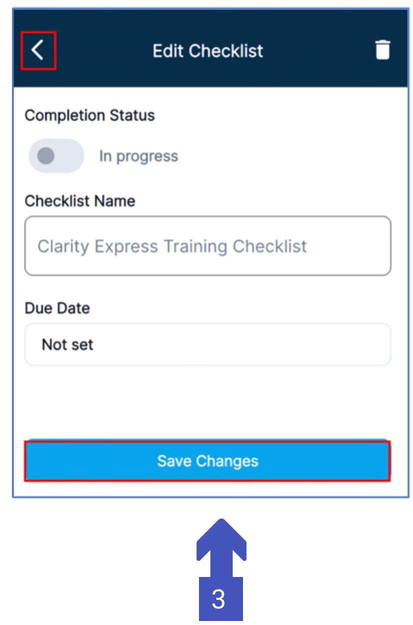


To edit or add collaborators to a Checklist or Smart List:

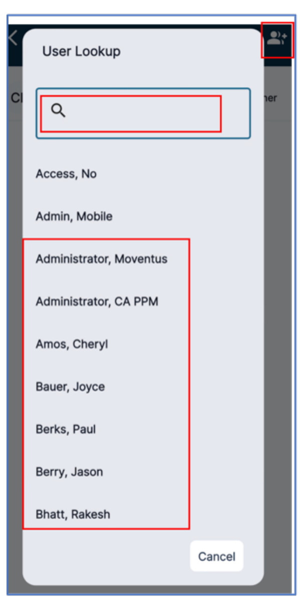
1. Tap the Checklist/Smart List name.
2. In the header, tap the 3 dots to see available actions, including:
   a. Set the screen as Home.
   b. Edit.
   c. View and modify collaborators. (See next section.)
3. Here, you can see when Edit Checklist is selected, users can edit the Checklist properties. Tap Save Changes to save. Use the '<' Back icon to navigate to the Checklist/Smart List To Dos.

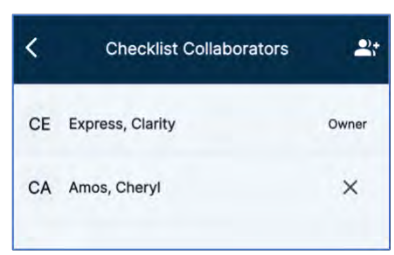




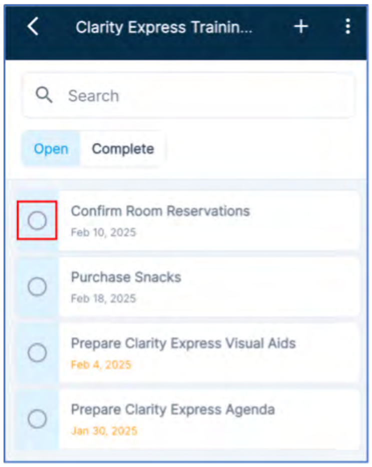


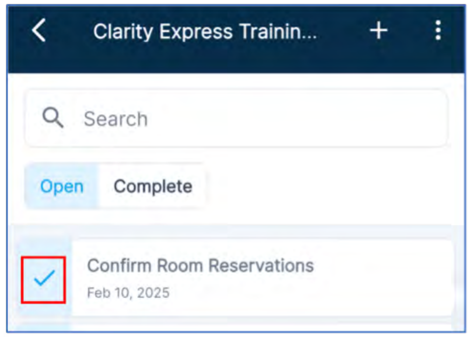
4. Collaborators Icon – Search, view and/or modify the current list of collaborators. When a name is selected, it is automatically added as a collaborator. Remove collaborators by clicking the "x" next to their name.

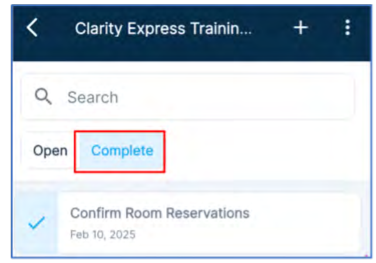




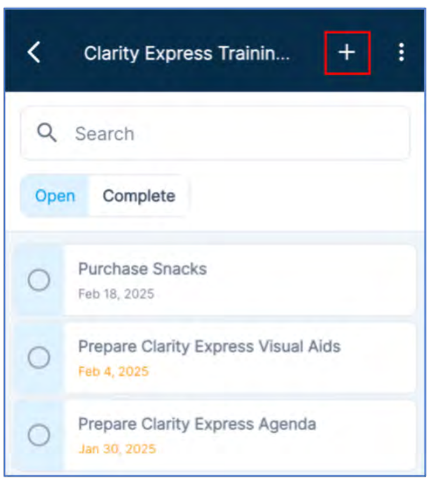
5 On the To Do list, users can tap on the circle icon next to an item to mark it complete.

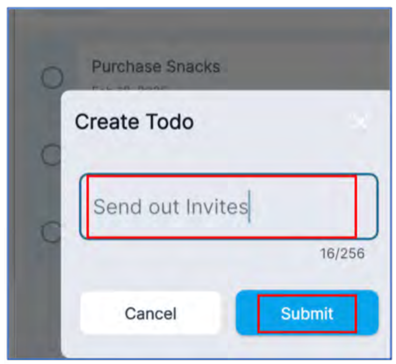


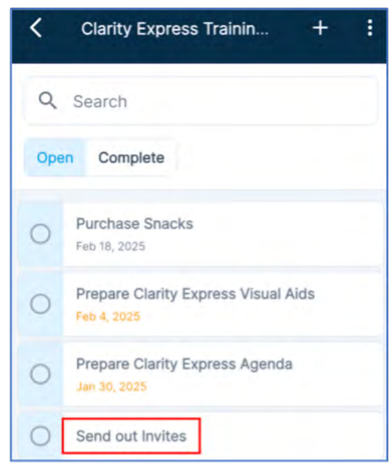




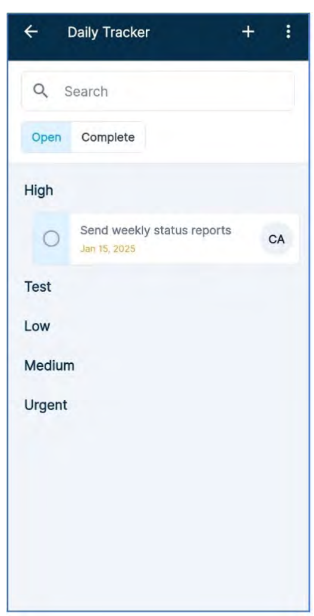
6 Tap the "+" icon to create a new To Do and tap 'Submit' when done. The new To Do will display in the Open To Do list.



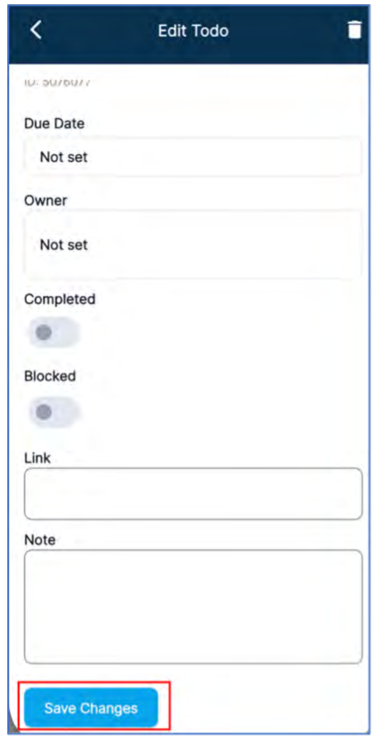




7 If working within a Clarity environment supporting To Do sections, the "+" icon will allow creation of sections. To Dos can be dragged and dropped into sections as well.



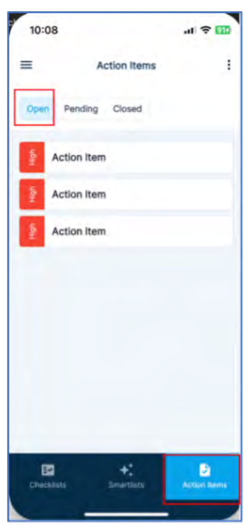
8 Taping on the name of a To Do will open the Properties view and allow users to edit the corresponding item. Once desired edits are done, click Save Changes.



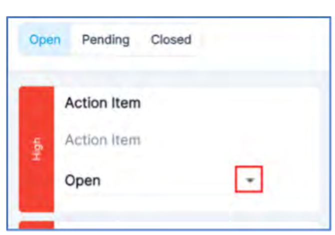
6.3 Action Items

Clarity Express allows users to manage their Clarity Action Items.

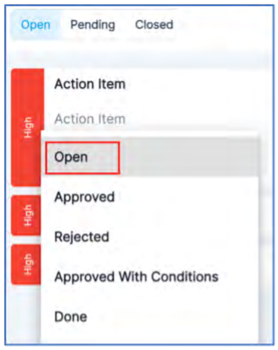
1 Users can switch between Open, Pending, and Closed Action Items.



2 The Action Item will display the item's Priority and Title on the collapsed view.



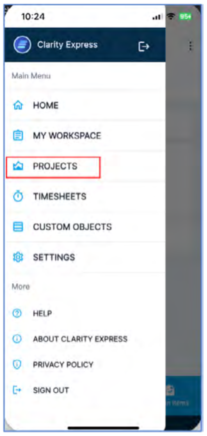
3. By taping on the title, the Action Item will expand and display the description.
4. The drop down at the bottom of the description will allow users to update the Action Item by choosing one of the available responses.

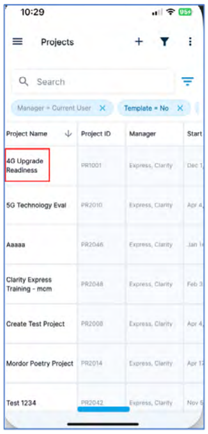


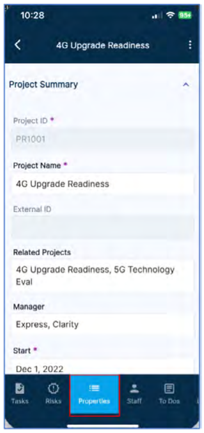
7. Projects

The “Projects” module allows users to navigate/view/edit Projects based on their access rights. The module will load into the grid view and allow the functionality described in the “Navigation” section. Once the user navigates into a specific project, they can use the bottom menu to navigate across available modules and custom sub objects. The Modules and the order in which they displayed are based on the blueprint. Supporting the following modules:

- Properties – Blueprint-based section/field display.
- Custom Objects – if the blueprint contains custom objects, those will be displayed and the instances can be listed, created, and edited.
- Staff – list the Staff members of the project and allow the instances to be edited.
- Tasks – list the project Tasks and allow the instances to be edited.
- Status Reports – list the project related instances and allow the instances to be edited.
- Risks – list the project related instances and allow the instances to be edited.
- To Dos – list the project related instances and allow the instances to be edited.
- Issues – list the project related instances and allow the instances to be edited.

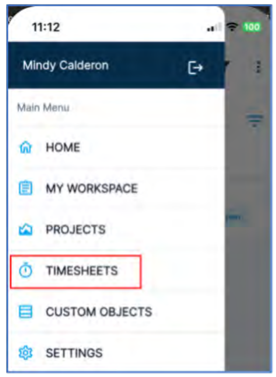






8. Timesheets

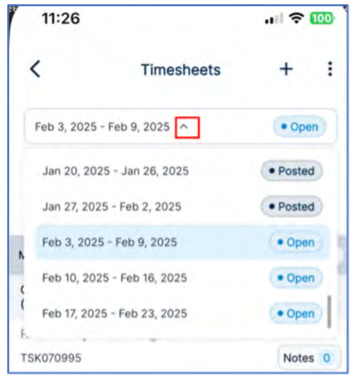
Once a user navigates to a Timesheet, they will be able to create, populate, add notes, and submit timesheets. With the appropriate access rights, they can return, approve and adjust timesheets.



The header section allows users to:

1. Search and Filter (using the to expand/collapse) the filter and to add/remove fields.

2 Tap the Timesheet record to navigate to the Timesheet properties. Select a different Time Period using the drop-down arrow at the top of the timesheet.



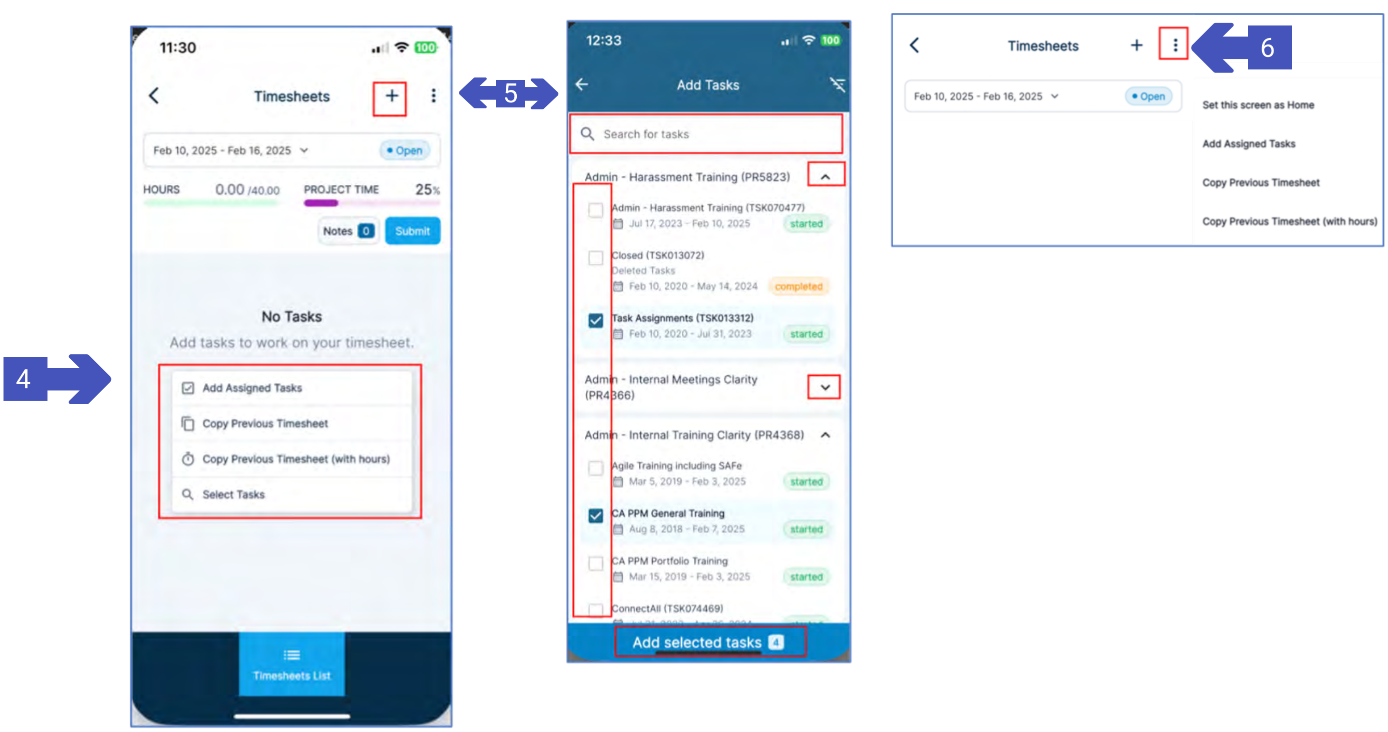
3 For an unpopulated Timesheet period, users can:

- Use Add Tasks to work on a timesheet to:
- Add Assigned Tasks.
- Copy Previous Timesheet.
- Copy Previous Timesheet (with hours).
- Select Tasks.

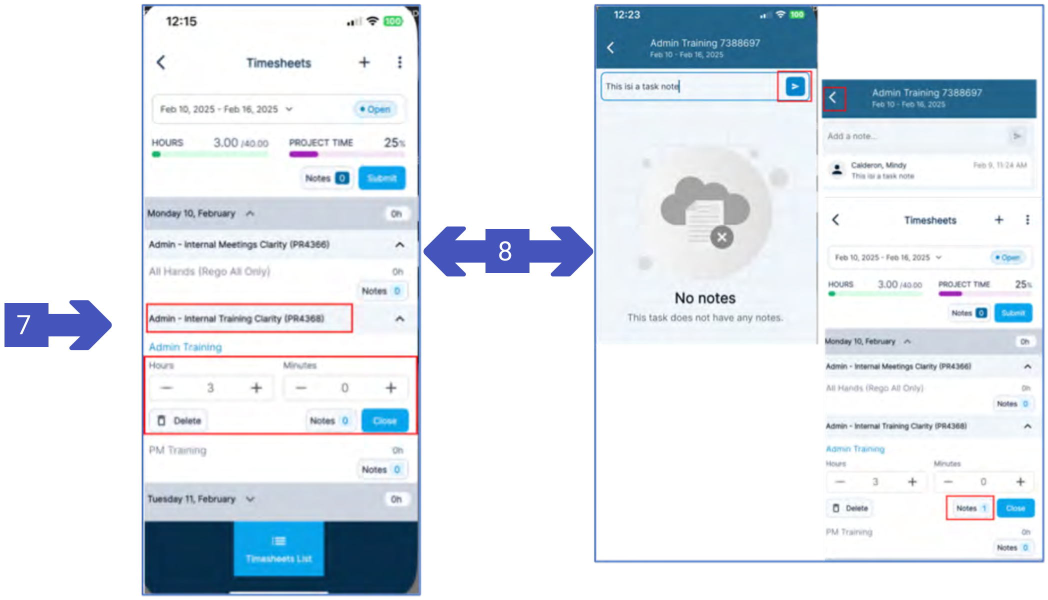
4 For a populated or unpopulated timesheet, users can:

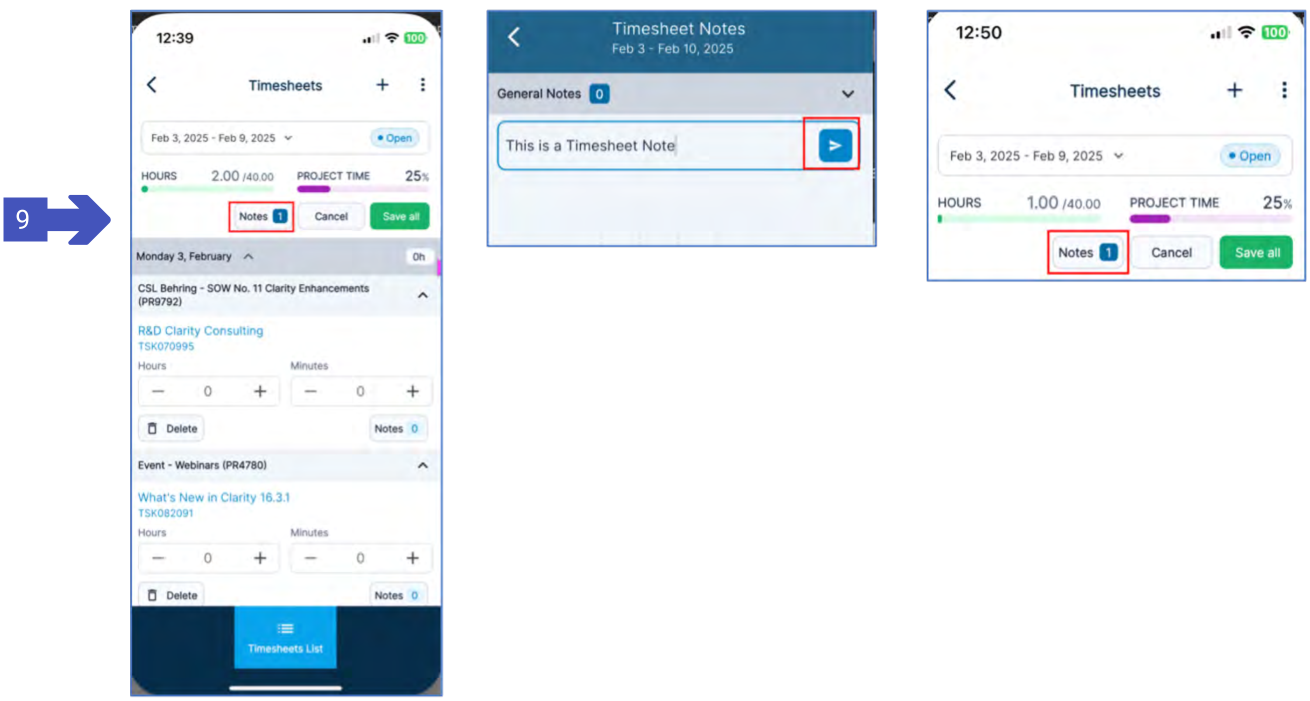
- Add specific tasks using the “+”
- Search for tasks, collapse/expand investments, check the task box(es), and ‘Add selected tasks (number of tasks selected).’

5 Use the ⋮ as another way to add tasks.

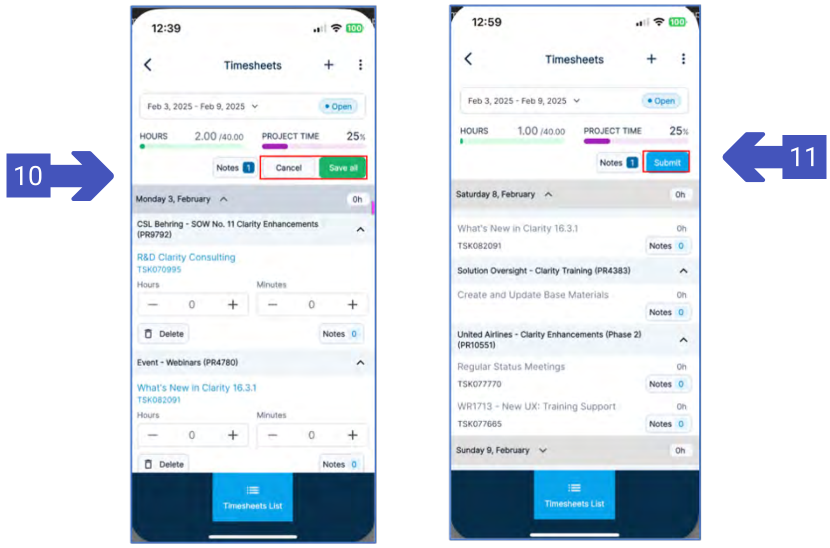


6. Tap the Task name to edit the Task.
   - Add hours and minutes (use the “+” / “-“).
   - Delete Task using the ‘trashcan’.
7. Tap Task Notes (Notes) to add a Task Note.
8. Tap the Timesheet Notes button to add a Timesheet note.

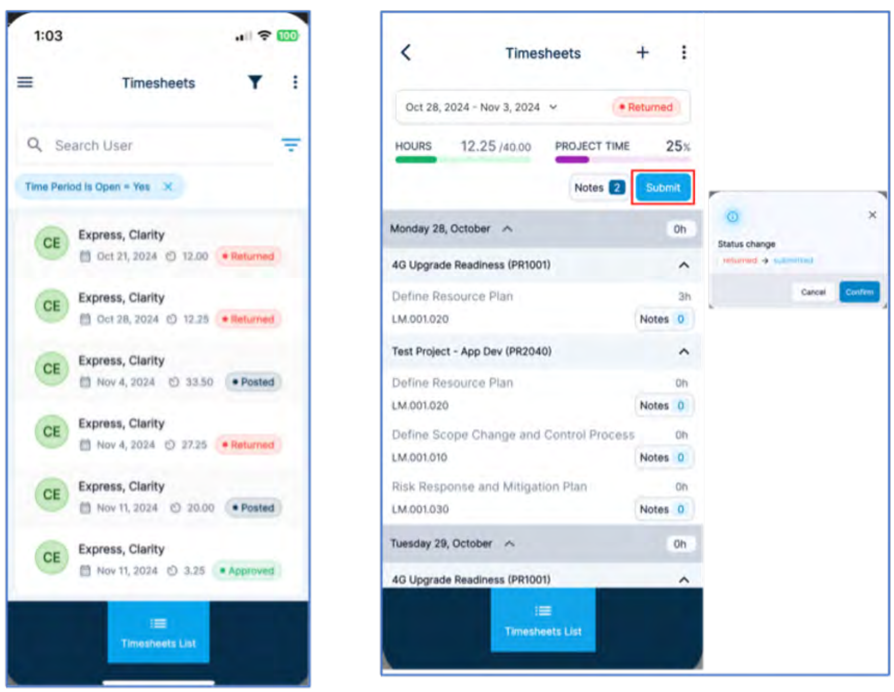




9. Tap 'Save All' to save multiple changes or 'Cancel' to cancel all timesheet changes.
10. Tap the Submit button to submit the Timesheet.

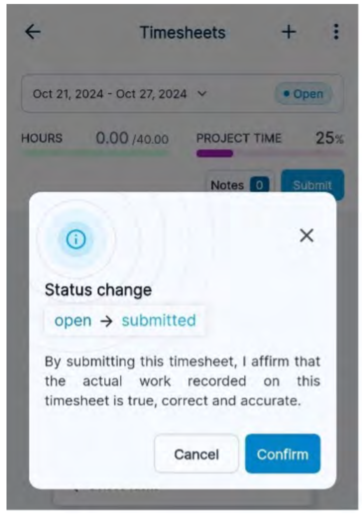


11. Tap the Timesheet to open/edit/submit a Returned timesheet or to Adjust an Approved timesheet (available with the appropriate access rights).

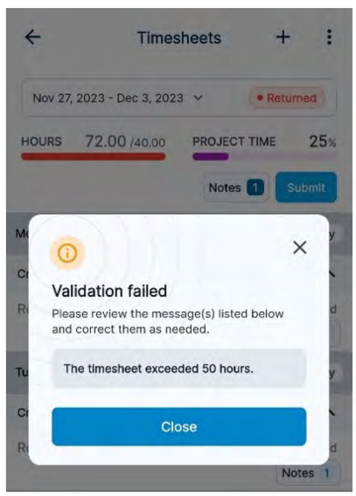


12 When submitting timesheets, Clarity Express supports:

- Attestation configuration in MUX:



13 Real time timesheet validations in MUX:

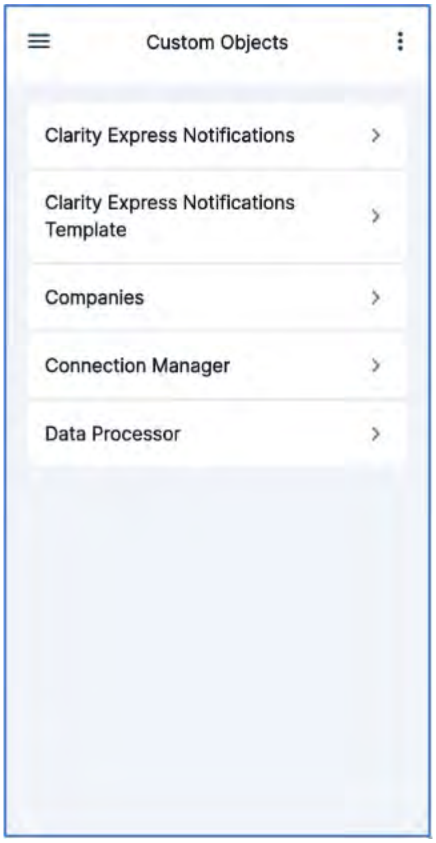


9. Custom Objects

Clarity Express supports navigating top level/parent Custom Objects within the environment. Navigate to the “Custom Objects” module to see a list of available objects.

Click on the desired Custom Object, for Grid and Properties View functionality. Please refer to sections 6.3 and 6.4

Note: Modules and sub objects are currently not supported.



clarity express

Thank you for your interest in the Clarity Express app!
We appreciate your support and feedback.
Enjoy your experience!

For further assistance, you can contact support through the Settings section of this app.

www.regoconsulting.com info@regoconsulting.com 888.813.0444

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